

Summary of Equestrian Research Survey 2004-2005

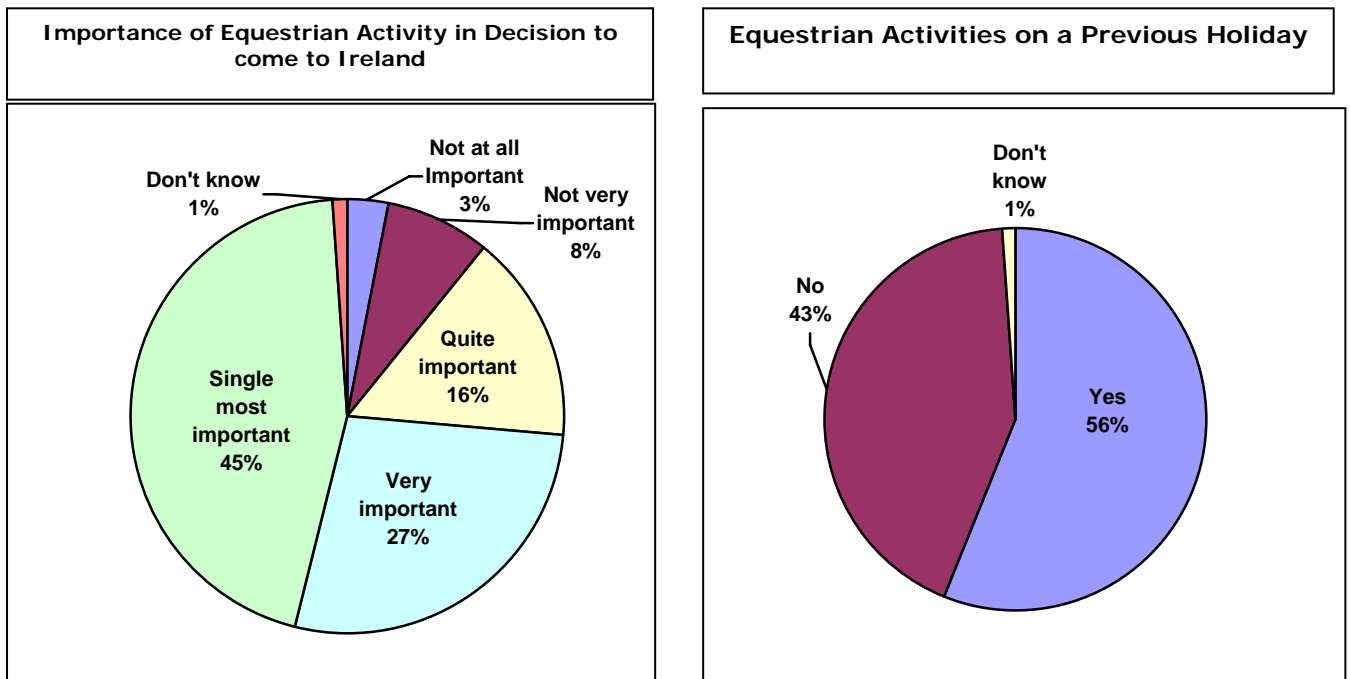
Methodology

In the summers of 2004 and 2005, face-to-face interviews were undertaken with consumers from Ireland, Britain, North America and Mainland Europe, who were engaging in equestrian holidays in Ireland, with a total of 561 interviews completed. At the same time, in-depth interviews were also conducted with 17 members of the specialist travel trade in the key markets for equestrian holidays. This research was supplemented in 2005 with a further 11 in-depth interviews amongst journalists with specialist equestrian publications in four key markets.

This document is a summary of the findings of the research, conducted by Behaviour & Attitudes on behalf of Fáilte Ireland.

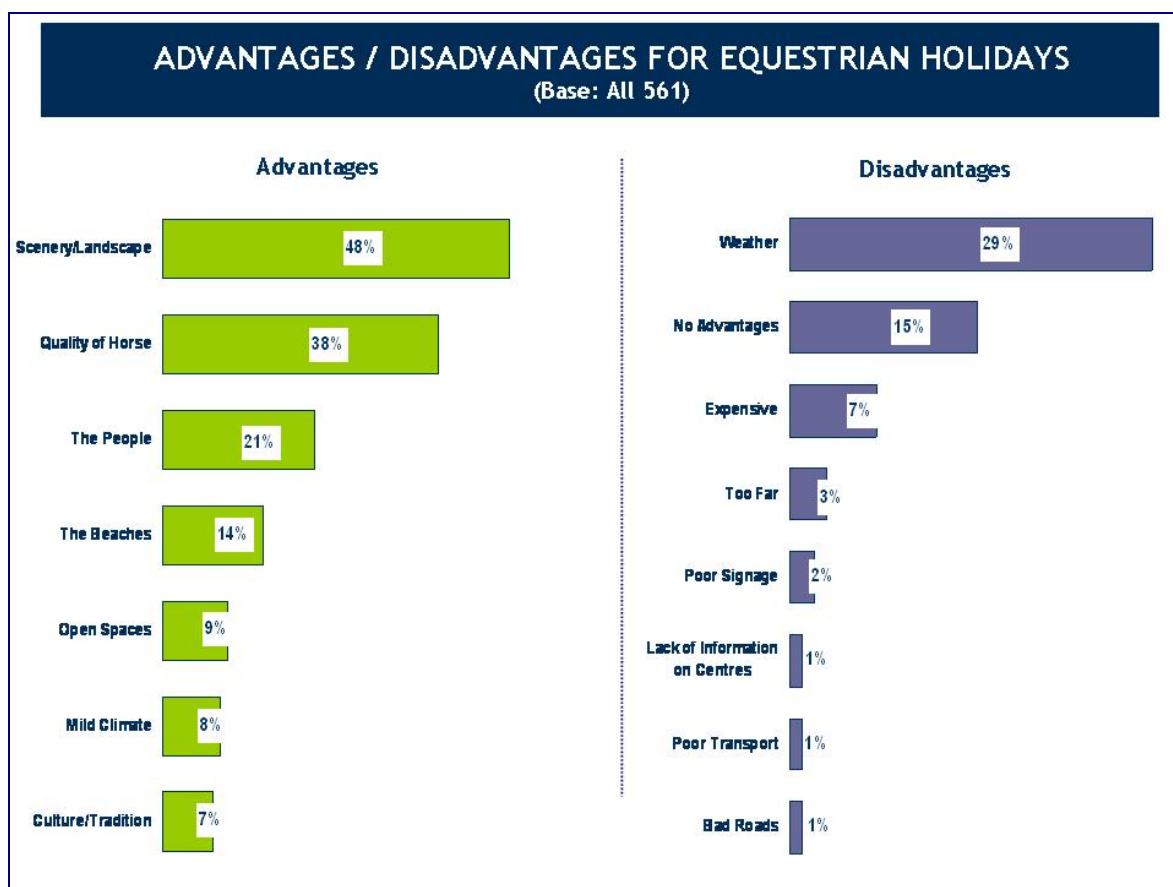
Main findings

The research suggests that Ireland offers a distinctive equestrian holiday experience based on its landscape, equestrian guides and the horses themselves. Riding in Ireland allows the holidaymaker to get close to nature in a landscape which is perceived to be varied and spacious. For Europeans in particular, this contrasts with the tendency for riding in indoor facilities in their home countries. Advertising of Irish equestrian activities has successfully captured this feeling of harmony with nature in a spacious environment through evocative imagery. The only concern about the Irish landscape was that its very ruggedness might intimidate beginners.



Holidaymakers who come to Ireland for equestrian holidays are enthusiasts, with half of them stating that participation in equestrian activities was their main reason for visiting Ireland and 44% claiming that they had chosen to take an equestrian holiday before they had decided on a destination. The bulk of holidaymakers describe themselves as either intermediate (43%) or advanced (39%) riders. In terms of their demographic profile, they are predominantly female (71%), middle class (92% ABC1) and under 45 (68%). They also tend to be adventurous and fond of the outdoors. From an Irish point of view, their long length of stay (11 days) and the rates of repeat

visits (50% having visited before and 43% having visited four or more times), are particularly noteworthy.

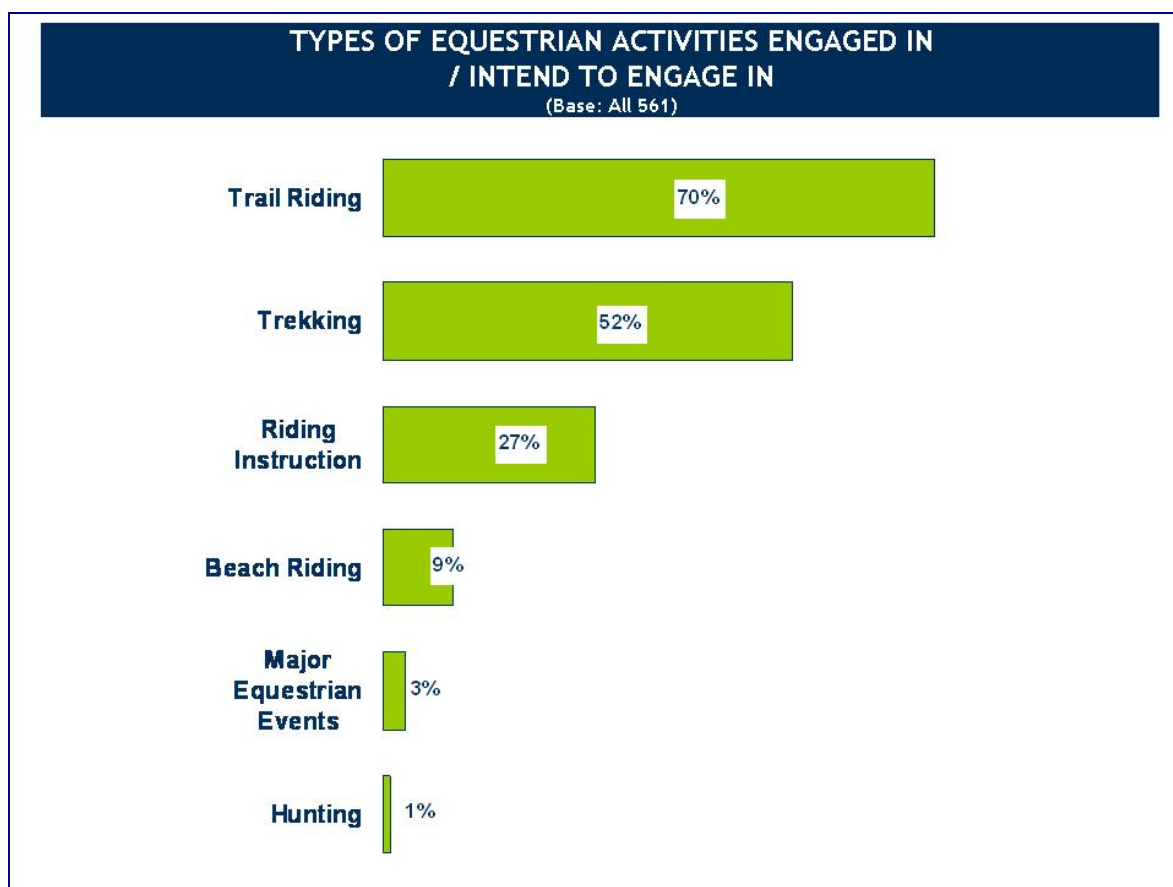


There is a widespread impression in all markets that the Irish people have a unique love for and understanding of horses. As such, equestrian holidaymakers felt that they were among people who share their enthusiasm (63% regularly engage in equestrian activities at home) for horses and consequently felt more at home. In addition, guides in Irish equestrian centres were perceived to be very good teachers as riders felt they were learning in a relaxed, safe and supportive environment. Though their impressions of Irish guides was generally very positive, it seems that overseas visitors did find some aspects of Irish equestrian culture puzzling. The Irish approach to horse care was one area where there were notable differences between the Irish and their foreign guests. While overseas visitors generally treat their horses at home like they were pets; pampering them and housing them in pristine stables; Irish people are perceived to treat horses as working animals and their stables appear to be more primitive to foreigners' eyes.

It should be stated that there was no suggestion that Irish horses are maltreated, on the contrary, visitors found horses to be healthy and in good physical condition. Indeed, the horses are one of Ireland's key advantages. They have a seemingly unique combination of strength, stamina and crucially a placid temperament making them suitable for riders of all skill levels.

Other outdoor activities do not feature prominently in the list of other activities undertaken by these holidaymakers. Instead more generalised tourist activities, such as shopping (68%), visiting places of historical/cultural interest (48%) and visiting

gardens (20%) are undertaken. Hiking/cross-country walking (25%) was most popular other outdoor activity.

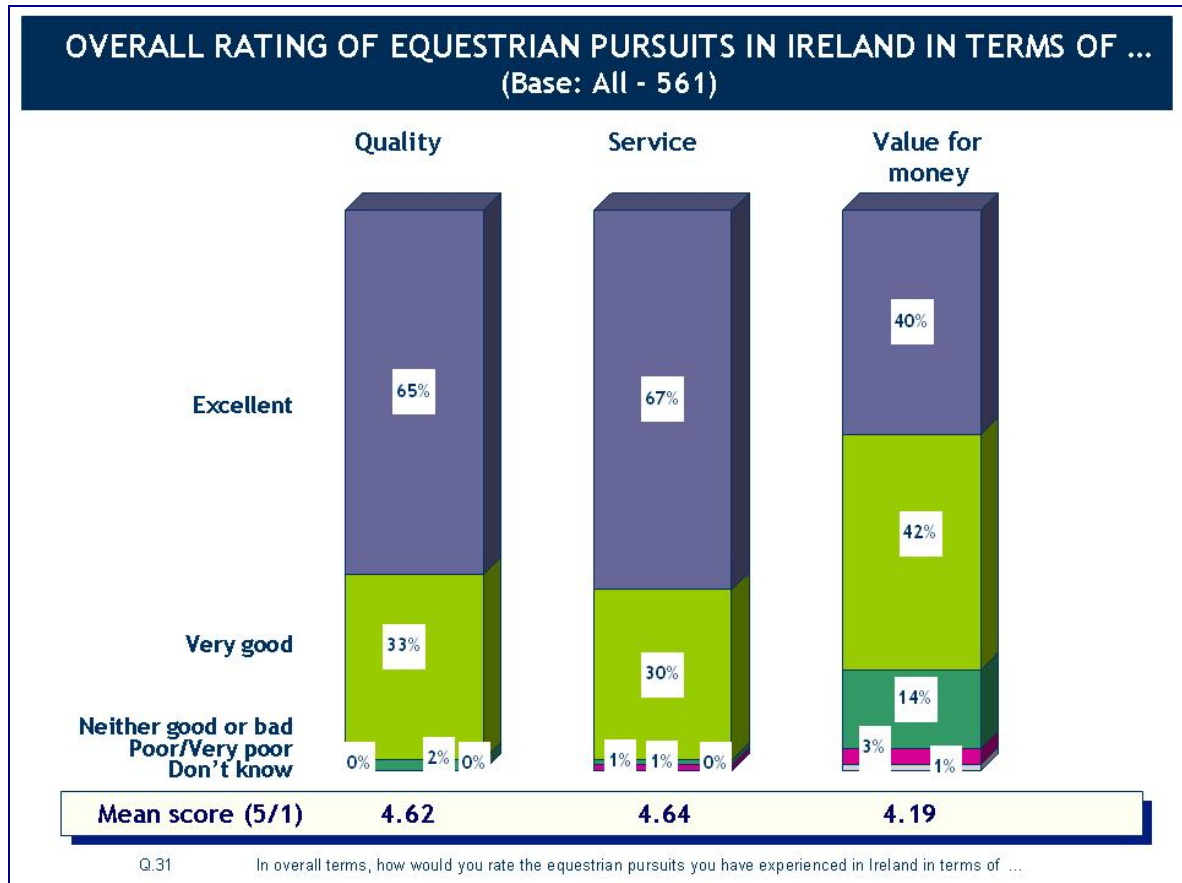


Among equestrian activities, trail-riding and trekking were the most popular, with 70% and 52% of visitors engaging in these activities respectively. Riding instruction was also important, especially for North American visitors. The popularity of trail-riding and trekking was based in part on the high quality of the trails according to specialist journalists. There was concern however that the dominance of trail riding and trekking in Ireland might leave it open to the impression that it is purely a trekking and trail riding destination. Both the tour operators and the journalists felt that there were areas where the Irish product could be expanded. In particular, they mentioned the provision of specialist tuition for children and for more serious riders as areas where Ireland could improve its offering.

Another aspect of Ireland which was perceived to be less than perfect was air access, with visitors from central Europe finding it difficult to get to the South West region, in particular. They often found themselves spending an unwanted night in Dublin at the beginning or end of their holiday. Inevitably, the weather was also an issue for some holidaymakers, though given their fondness for the outdoors, the comparatively mild climate and improved supply of raingear by the equestrian centres, it is not a major problem.

The high cost living in Ireland is seen as a real cause for concern, with consumers, tour operators and journalists all mentioning it. Tour operators claimed that sharp rises in costs were occurring without any perceived improvement in standards. Where the equestrian product is concerned, much of this added expense can be attributed to increased insurance costs. The specialist journalists put a greater emphasis on general

non-equestrian costs like food and drink. While holidaymakers tended not rate value for money as poor (52% actually rated it good or very good), it compares poorly with other assessments of their holiday. Mainland European visitors, whose home economies are struggling and who may also be in the Eurozone, were more price sensitive.



Overall, visitors were satisfied, with two-thirds claiming that their holiday at least met their expectations and a further third claiming their expectations were exceeded. Two-thirds of respondents also rated the quality and service on their holiday as excellent. Some 63% of visitors claimed that Ireland is better than its nearest competitor, largely because of the quality of horses. Along with the high rates of repeat business, these figures suggest that on balance the equestrian product in Ireland is of very good quality, though there is always room for improvement.